User Guide for Respond Issues Database

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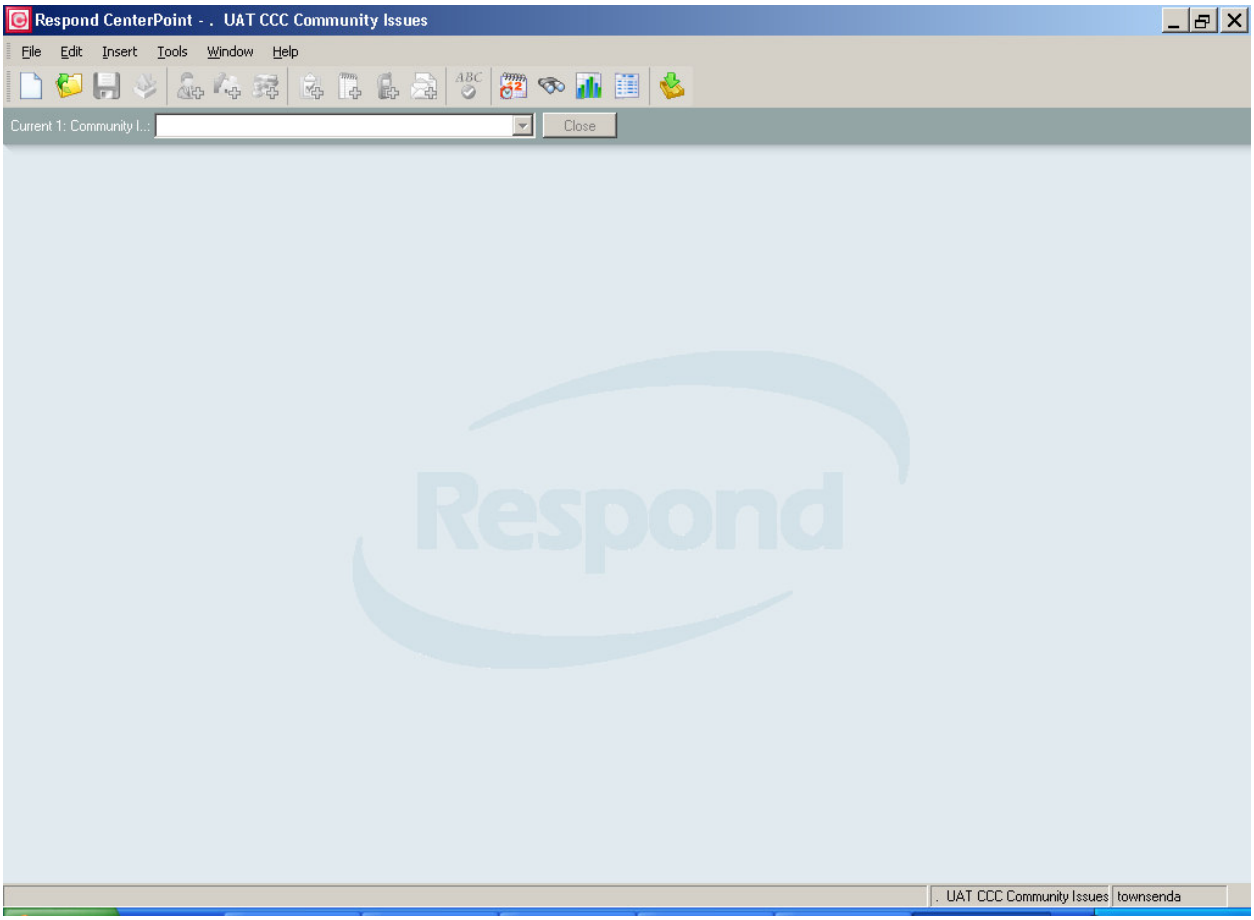
Logging Issues of Concern

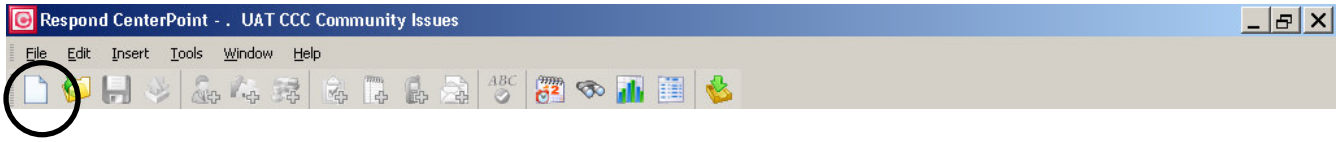
This guide provides step-by-step instructions for using the Respond system. Guidance as to which issues should be recorded is contained in a separate document.

Logging into Respond

- Double click the 'Citrix Respond' internet shortcut on your desktop
- Fill in your User name, Password and Domain and click Log In. NB: these are the same as when you initially log in to the system at the start of the day, and domain would normally be *Cumbria*.
- Click the Respond 37 icon in the 'Applications' window.
- If the 'Cumbria County Council ICT policy' window appears click ok.
- Sign on by completing your Respond user and password details then click ok.
- A Respond 'Message of the Day' may appear. Note the contents and close.
- In the 'Alarm' window click close. If you wish, you may display the alarmed tasks or refresh your diary by following the instructions.
- You are now in Respond. The screen should look like this:

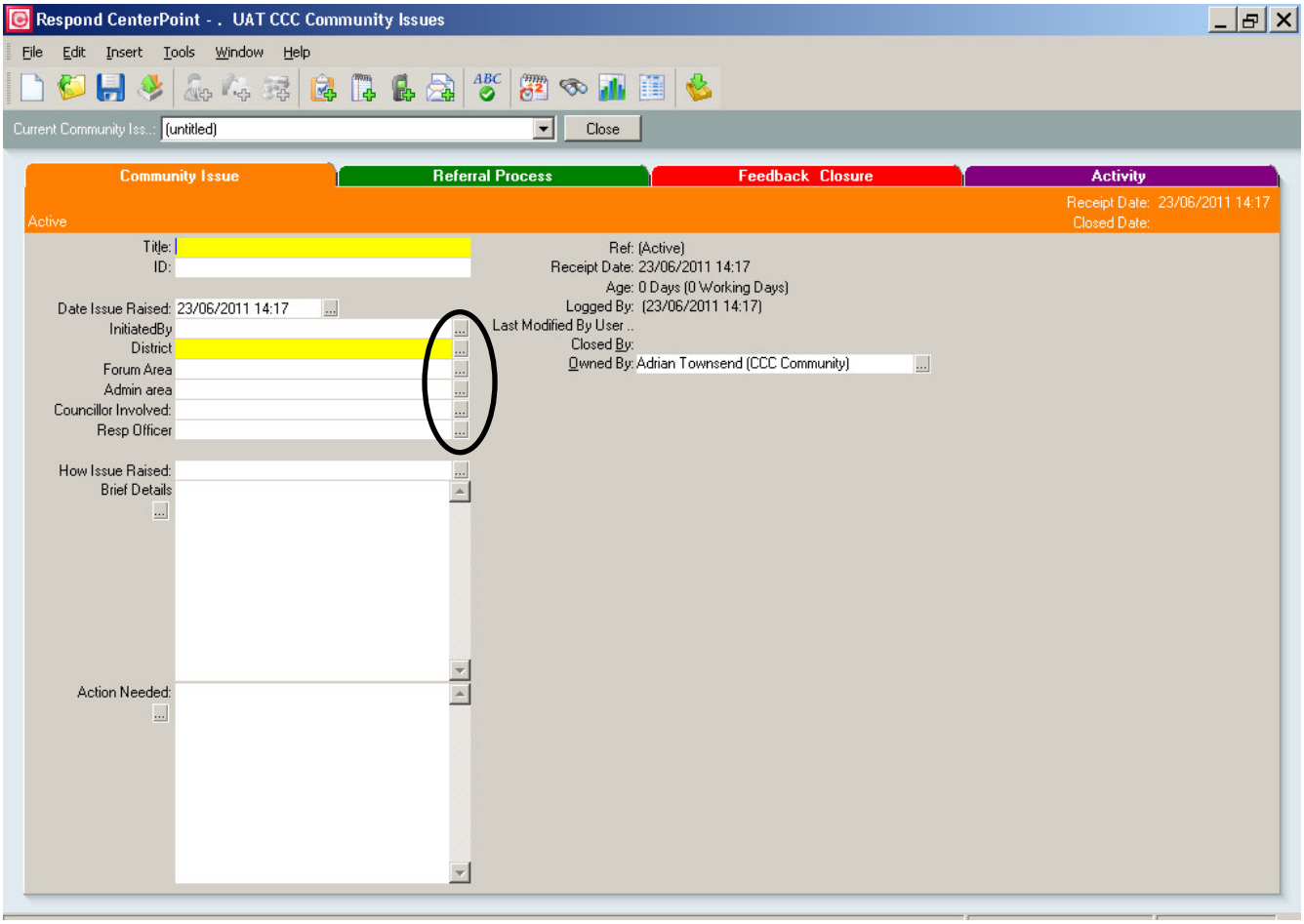

Respond CenterPoint - . UAT CCC Community Issues
File Edit Insert Tools Window Help
Current 1: Community I...
Close
. UAT CCC Community Issues
townsenda

Creating a New Issue



Select 'new community issue' icon (which is shown circled above). There are now 4 tabs at the top of the screen. You are in the first tab which is the Community Issue section.

Section 1 – Community Issue



Note the layout as shown above. Yellow fields are mandatory, and the circled area shows examples of fields where you can select from a list by clicking the buttons. All lists have a 'Search For' area in which you can type the first few characters of your desired option.

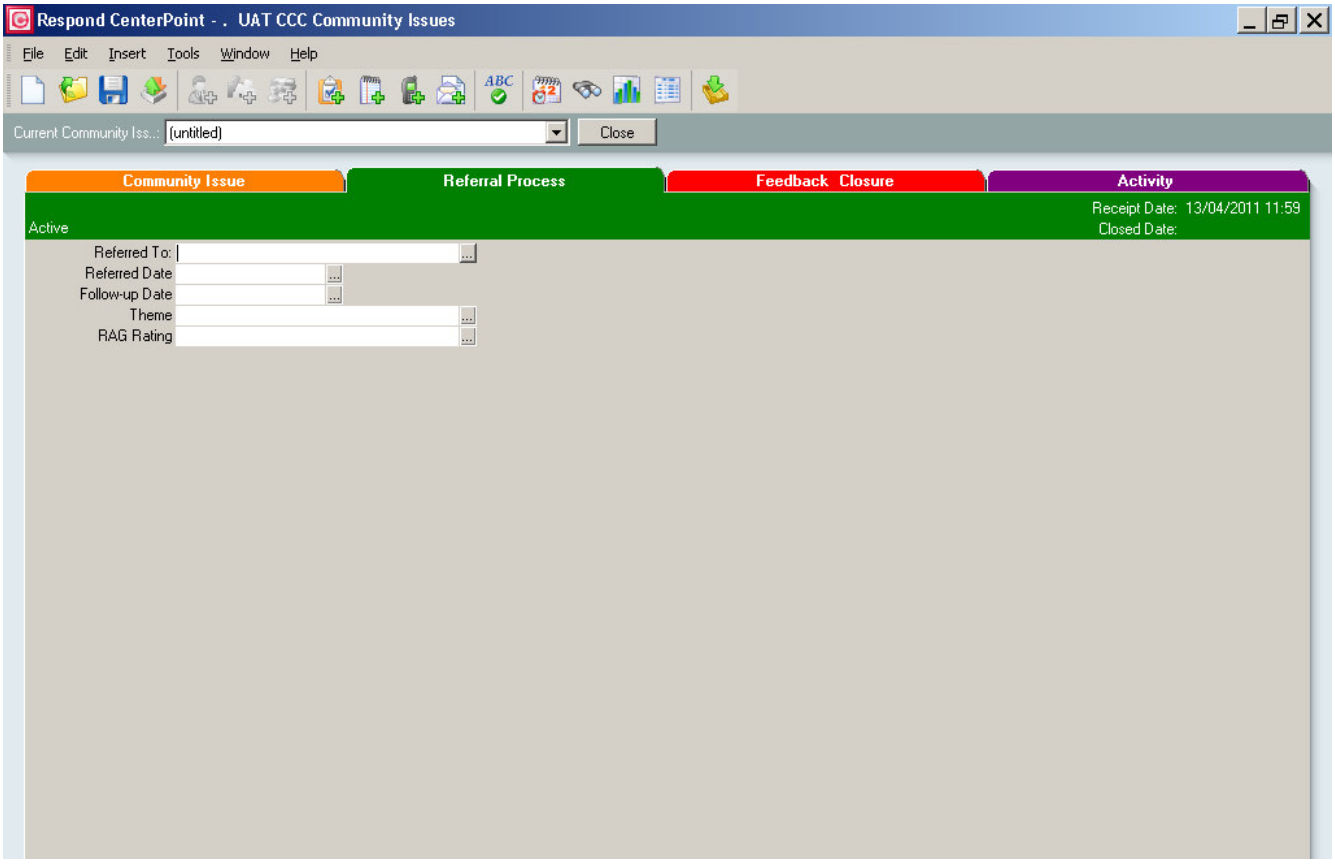
There is also some useful information that you cannot change, such as the age of the issue, who logged it, when it was modified and who closed it. An explanation of each field and the data required is outlined below:

- **Title**. A meaningful title which you can later easily search for out of a list of issues. A word or two to describe the issue, and where it is, is recommended. For example, 'Parking difficulties – Kendal'.
- **ID**. Do not enter anything here; it is automatically generated by the system.

- **Date Issue Raised**. Defaults to the date and time logged on. Can be changed by clicking the box to the right of the field, selecting a date and clicking 'OK'.
- **Initiated By**. By whom – select from the list.
- **Forum Area**. Select from the list. Multiple selection and area-wide options are also available.
- **Admin Area**. Select from the list – you can use Districts, Electoral Divisions or Wards, and it allows multiple selections if the issue is cross-boundary. Although there is a 'Search For' facility, an anomaly means this does not always work here and you are best scrolling down the sub-options.
- **Councillor Involved**. If a councillor is involved in resolving or overseeing the issue, select their name from the list which is arranged by alphabetical order of surname. Several names can be selected if needed.
- **Resp Officer**. The officer responsible for monitoring the issue. This would normally be a member of staff from the Area Team: select their name from the list, again arranged by surname.
- **How Issue Raised**. Select from the list.
- **Brief Details**. A brief description of the issue. Type in.
- **Action Needed**. What is needed to be done to try to resolve the issue. Type in. NB: Respond allows the setting of tasks, recording of telephone calls etc. in the Activity sheet and can be seen via the diary facility. Details are provided later in this guide.
- **Owned By**. Defaults to you, i.e. the person who has logged in. Can be changed by selecting from the list.

The next step is inputting the referral process.

Section 2 – Referral Process



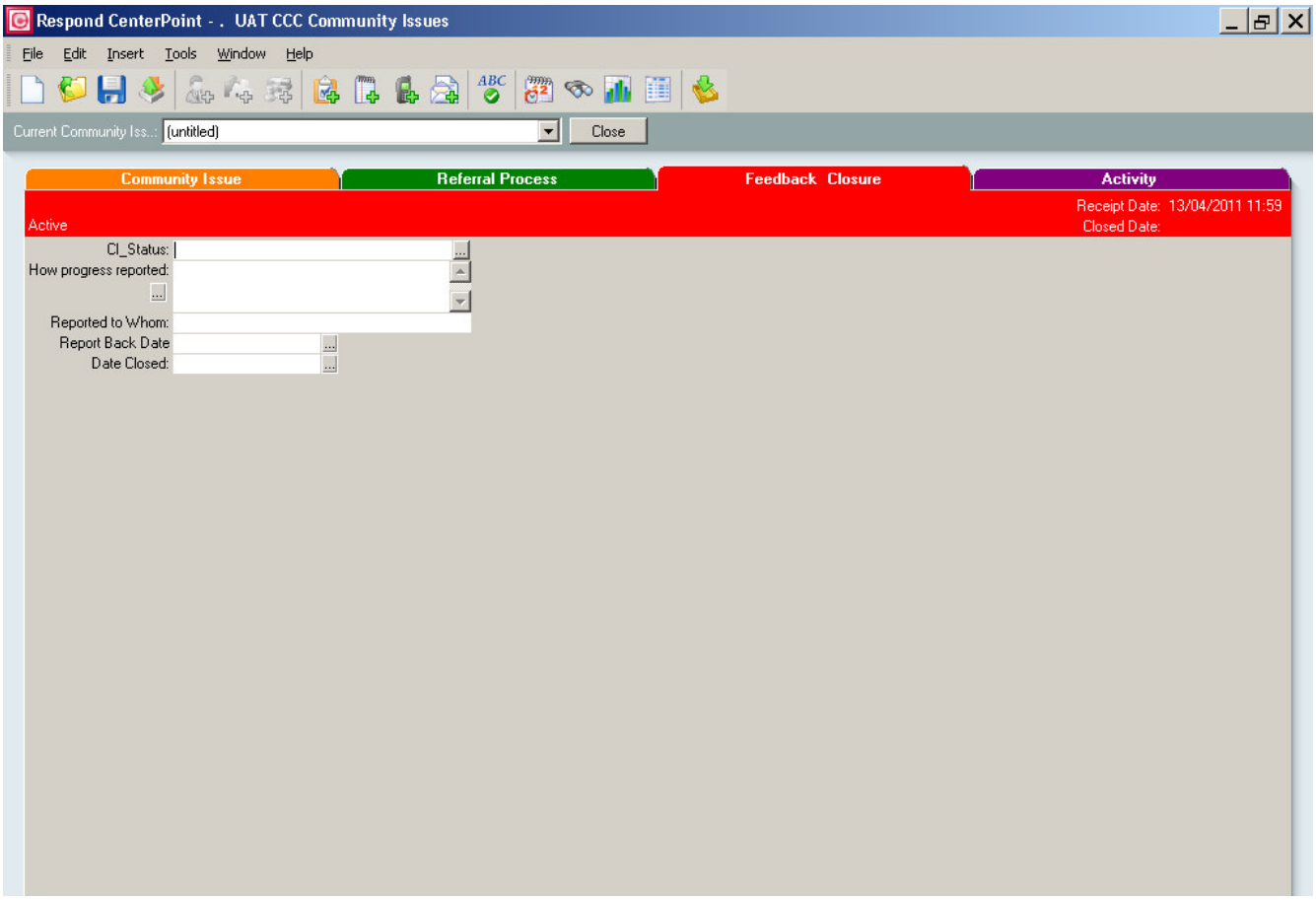
As you can see, most of the fields are populated by drop-down lists as in the previous section.

- **Referred To**. To whom the issue was referred, this may be another department within CCC or an external organisation. Select from the list. If you require any further options on the list, contact Adrian Townsend (adrian.townsend@cumbria.gov.uk).
- **Referred Date**. Select the correct date the issue was referred. This should be within one week of the issue being raised.
- **Follow Up Date**. Select the date that the issue should be followed up. If this is necessary, it should be within 30 days of the issue being raised.
- **Theme**. The general theme for reporting purposes. Select from the list.
- **RAG Rating**. The latest issues guidance (separate document) explains the traffic light system. In the drop-down list, there is an additional option for longstanding issues.

This section will need to be regularly updated if the issue is being referred to a different department/organisation than previously, or if the RAG rating changes. Any changes here can also be reflected in the 'Actions Needed' free text area, explained in Section 1.

When it has been agreed that the issue has been closed, change the RAG rating to Green and follow the next step, the closure process.

Section 3 – Feedback/Closure

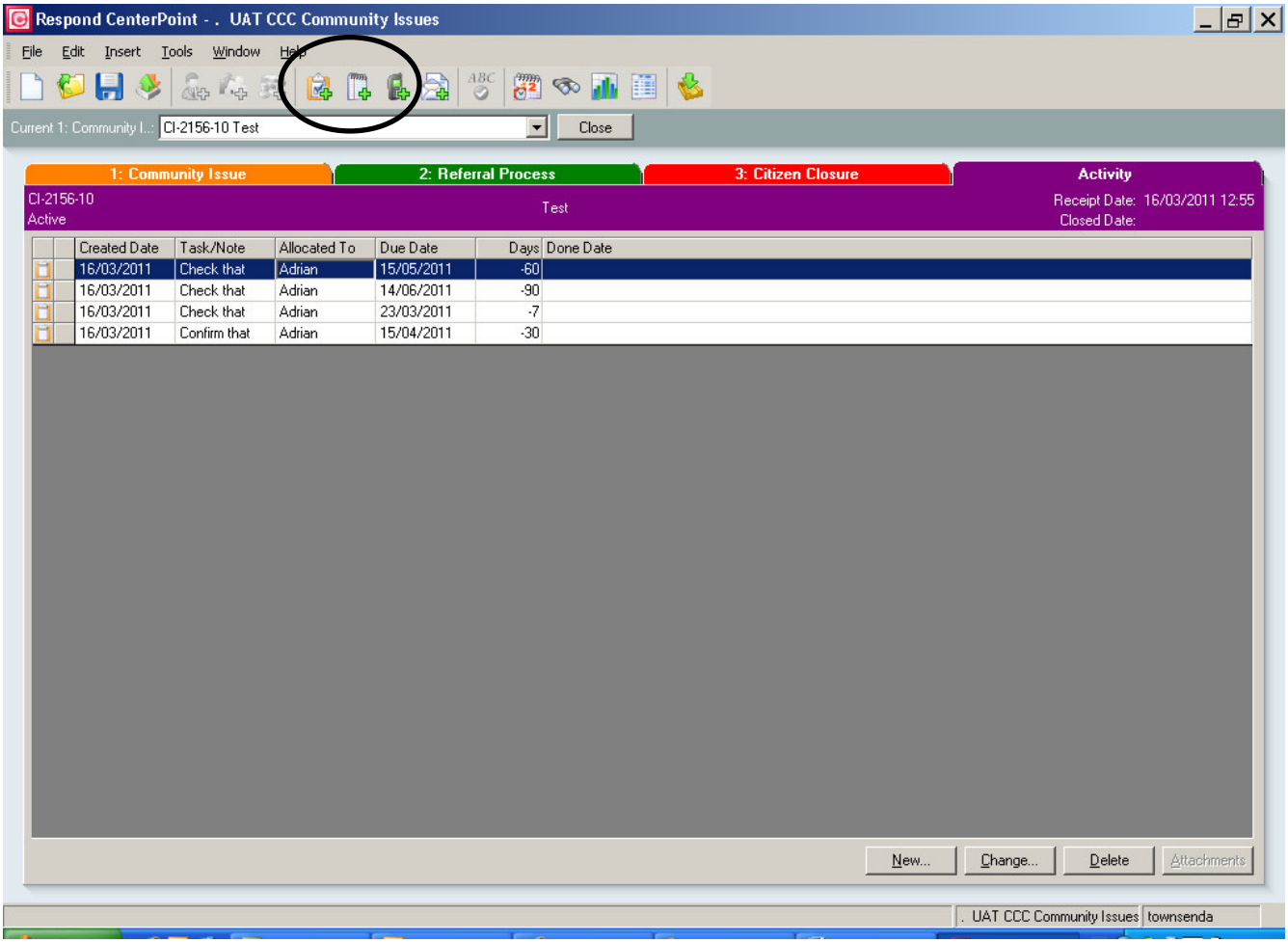


As well as recording the formal closure of the issue, this section collects information on how the progress or resolution of the issue is relayed to the public, for example via engagement events.

- **CI Status**. The status of the issue, i.e. submitted, referred, followed-up or closed. Select from the list.
- **How Progress Reported**. A brief outline of how the outcome of this issue was fed back to interested parties, and by what means (e.g. an event, meeting, email etc.)
- **Reported to Whom**. Free text, could be a name, community group, residents of a particular locality etc.
- **Report Back Date**. Select the date that the issue should be/has been reported back. This should be within 2 months of the issue being raised.
- **Date Closed**. Select the date that the issue has been closed. Unless it has been identified as a longstanding issue, this should be within 3 months of it being raised. See page 15 for full instructions on closing an issue.

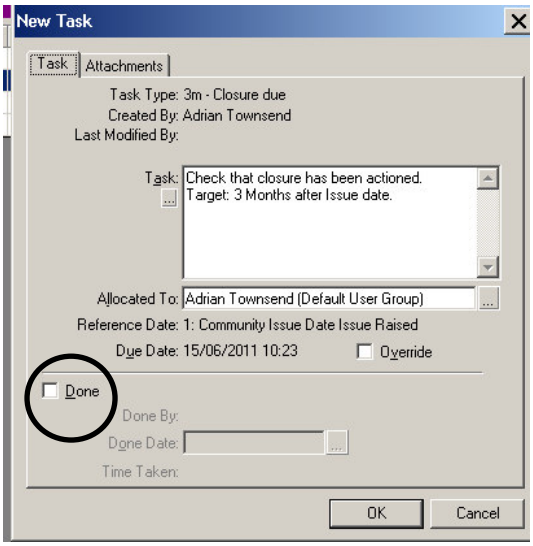
Section 4 – Activity

This section holds details on activities which support the issue and assist in its resolution. It also holds 'triggers' or reminders to undertake various stages, namely referral, follow-up, reporting back and closure. You are also reminded of these in your diary (see later).


Respond CenterPoint - . UAT CCC Community Issues
File Edit Insert Tools Window Help
Current 1: Community I...: CI-2156-10 Test
Close
1: Community Issue
2: Referral Process
3: Citizen Closure
Activity
CI-2156-10
Active
Test
Receipt Date: 16/03/2011 12:55
Closed Date:
Created Date | Task/Note | Allocated To | Due Date | Days | Done Date
16/03/2011 | Check that | Adrian | 15/05/2011 | -60
16/03/2011 | Check that | Adrian | 14/06/2011 | -90
16/03/2011 | Check that | Adrian | 23/03/2011 | -7
16/03/2011 | Confirm that | Adrian | 15/04/2011 | -30
New...
Change...
Delete
Attachments
. UAT CCC Community Issues
townsenda

The four triggers automatically appear in the activity box when you create a new issue.

When you have completed each stage, you need to open the trigger by double clicking on it. The following window now appears:



Here you can allocate the task to a different person by clicking on the box containing your name and selecting a name. Note that this will appear in their diary as a reminder. To complete the task, tick the 'Done' box (circled) and amend the date if the input is retrospective.

You may also wish to attach some evidence in the form of a document to some of the tasks, e.g. reporting back.

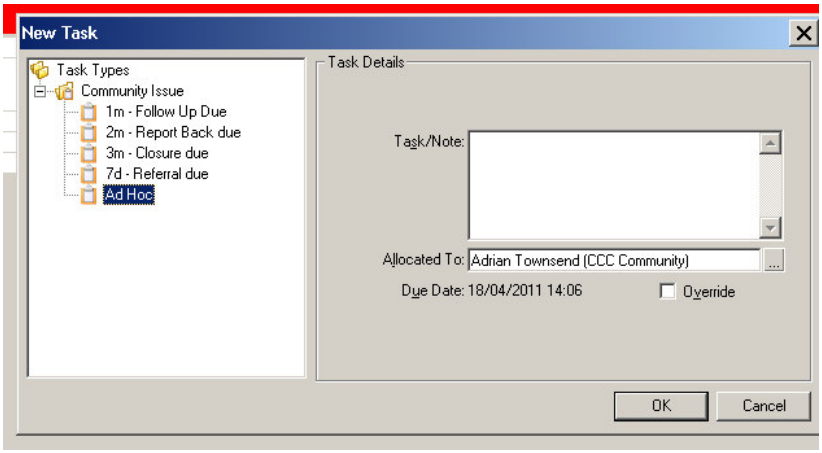
In this system there are several opportunities to attach documents or save reports. **It is therefore advisable to set up a folder in your area team file store space in which you can maintain standard templates and actual documents**.

While you are in the task window, open the 'Attachments' tab, click 'New', select a file and confirm by clicking 'OK'. The file now appears in the list. You can add further documents, open the ones there already and delete any that are no longer needed.

Click 'OK' to close the task window.

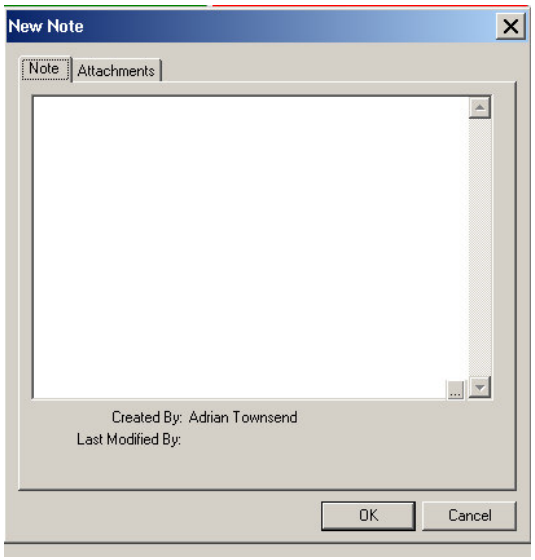
While you are still in the Activity section, you can create new tasks, notes and telephone call records. These can be accessed by clicking one of the icons circled on the screen view on page 5.

To create a **task**, click the icon and the following will appear:

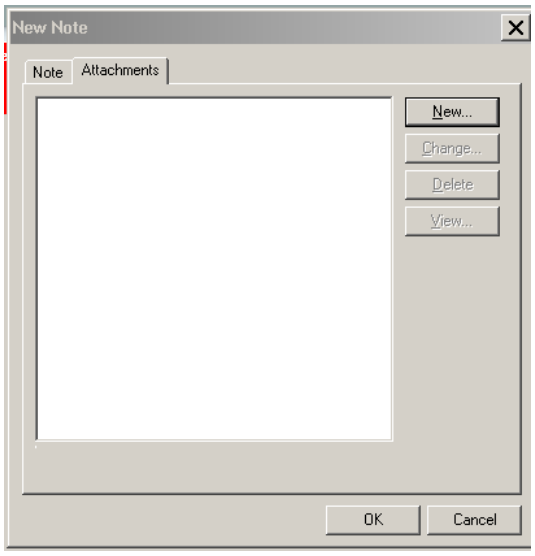


Select ‘Ad Hoc’ from the list on the left and type a brief description of the task. It is automatically allocated to you, but it is possible to allocate it to someone else by clicking on the button to the right and selecting a name.
Due date defaults to five days from the input date. To change, tick the ‘Override’ box and select a date from the calendar.

To create a **note**, click the icon and the following will appear:



This is a very basic version of the task facility: simply enter a brief description in the ‘Note’ sheet. However you may also attach a document if required, for example to provide evidence to support resolving an issue. Click on the ‘Attachments’ sheet and you will see this:



Click ‘New’ to attach a new document (the other buttons are shaded, but allow existing attachment(s) to be changed or deleted). Full instructions for attaching files are given on page 7.

To create a record of a **telephone call**, click the icon and the following will appear:

Under 'Call Is To' you can either type a name or select from the list. Click 'Incoming Call' if they called you. When you have clicked 'OK' a screen identical to the one for notes appears in which you can add further details and attach documents.

In the same way as for notes, the date of a telephone call defaults to the input date and cannot be changed, so it needs to be input immediately.

When you have finished creating an issue, remember to **SAVE** it. Either select File-Save or click the disk icon.

Letters, Emails & Other Documents

These can be attached to notes as described above. These can be saved in any of the usual formats, e.g. Word and Excel in the folder you have created (see page 6). Emails are to be saved as message format (.msg).

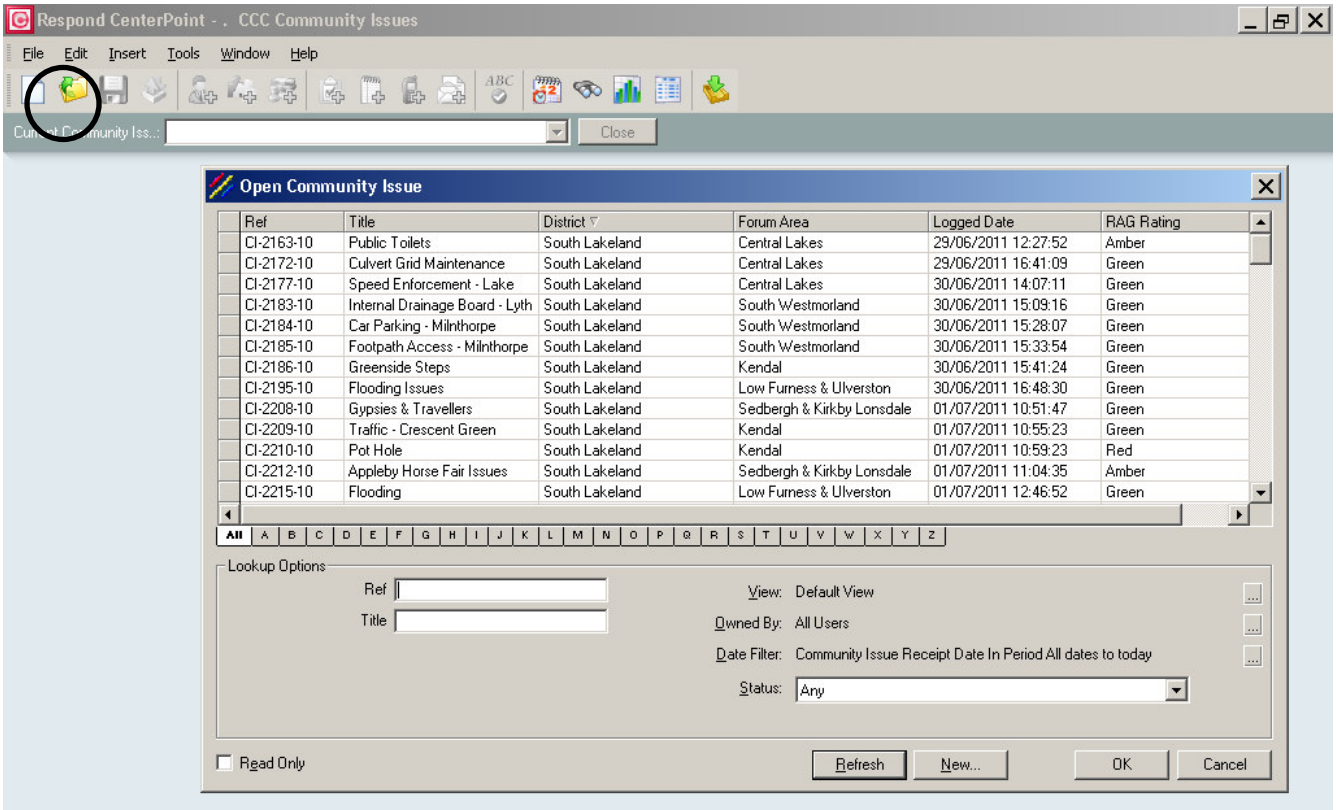
Opening an Existing Issue

There are two ways to do this: the 'Open' facility from which you can select from a table by title and details, or the 'Search' facility where there are queries set up to search by district, with the opportunity to set your own parameters if required.

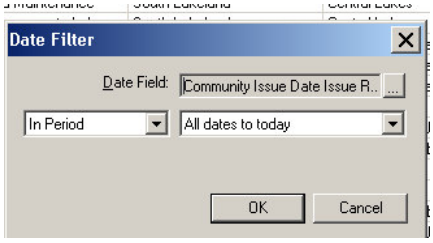
Open

Click on the 'Open Community Issue' icon (circled below) and you will see a table of all recorded issues. There are several ways to select the one you need:

- Scroll down the table and double click the record you wish to open.
- If you know the first letter of the issue title, click the appropriate letter on the alphabet below the table.
- Search in 'Title' or 'Ref'. Use % as a wildcard, e.g. if you are searching for anything in the title relating to pot holes, type '%pot%hole%' in the title box.
- You can filter the list to show only your issues or those of a colleague. Click the box alongside 'Owned By' and select from the list of names.


Respond CenterPoint - . CCC Community Issues
File Edit Insert Tools Window Help
Close
Open Community Issue
Ref | Title | District | Forum Area | Logged Date | RAG Rating
CI-2163-10 | Public Toilets | South Lakeland | Central Lakes | 29/06/2011 12:27:52 | Amber
CI-2172-10 | Culvert Grid Maintenance | South Lakeland | Central Lakes | 29/06/2011 16:41:09 | Green
CI-2177-10 | Speed Enforcement - Lake | South Lakeland | Central Lakes | 30/06/2011 14:07:11 | Green
CI-2183-10 | Internal Drainage Board - Lyth | South Lakeland | South Westmorland | 30/06/2011 15:09:16 | Green
CI-2184-10 | Car Parking - Milnthorpe | South Lakeland | South Westmorland | 30/06/2011 15:28:07 | Green
CI-2185-10 | Footpath Access - Milnthorpe | South Lakeland | South Westmorland | 30/06/2011 15:33:54 | Green
CI-2186-10 | Greenside Steps | South Lakeland | Kendal | 30/06/2011 15:41:24 | Green
CI-2195-10 | Flooding Issues | South Lakeland | Low Furness & Ulverston | 30/06/2011 16:48:30 | Green
CI-2208-10 | Gypsies & Travellers | South Lakeland | Sedbergh & Kirkby Lonsdale | 01/07/2011 10:51:47 | Green
CI-2209-10 | Traffic - Crescent Green | South Lakeland | Kendal | 01/07/2011 10:55:23 | Green
CI-2210-10 | Pot Hole | South Lakeland | Kendal | 01/07/2011 10:59:23 | Red
CI-2212-10 | Appleby Horse Fair Issues | South Lakeland | Sedbergh & Kirkby Lonsdale | 01/07/2011 11:04:35 | Amber
CI-2215-10 | Flooding | South Lakeland | Low Furness & Ulverston | 01/07/2011 12:46:52 | Green
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Lookup Options
Ref
Title
View: Default View
Owned By: All Users
Date Filter: Community Issue Receipt Date In Period All dates to today
Status: Any
Read Only
Refresh
New...
OK
Cancel

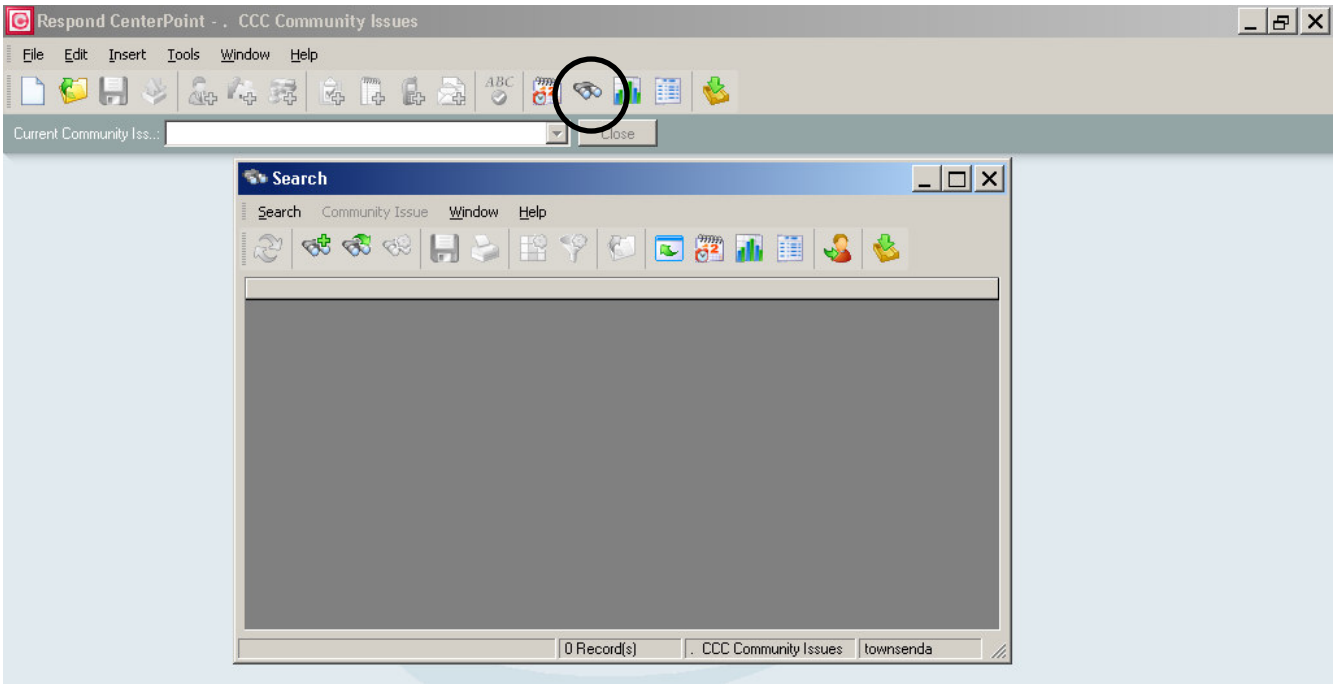
- Any of the date fields in the system can be used as a filter. Click on the button alongside 'Date Filter' and the following will appear:



- Select the date field you wish to filter and the lower two boxes help you to define the range: for example the whole period to date or between specified dates. Click 'OK' and your filtered list will be displayed.

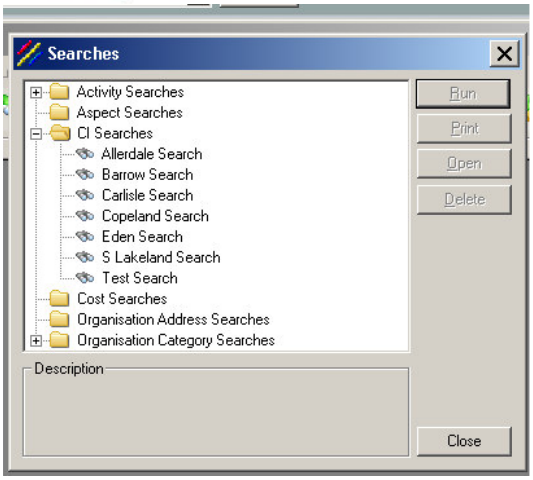
Search

Click on the binoculars icon, as circled below, and a search window will appear:

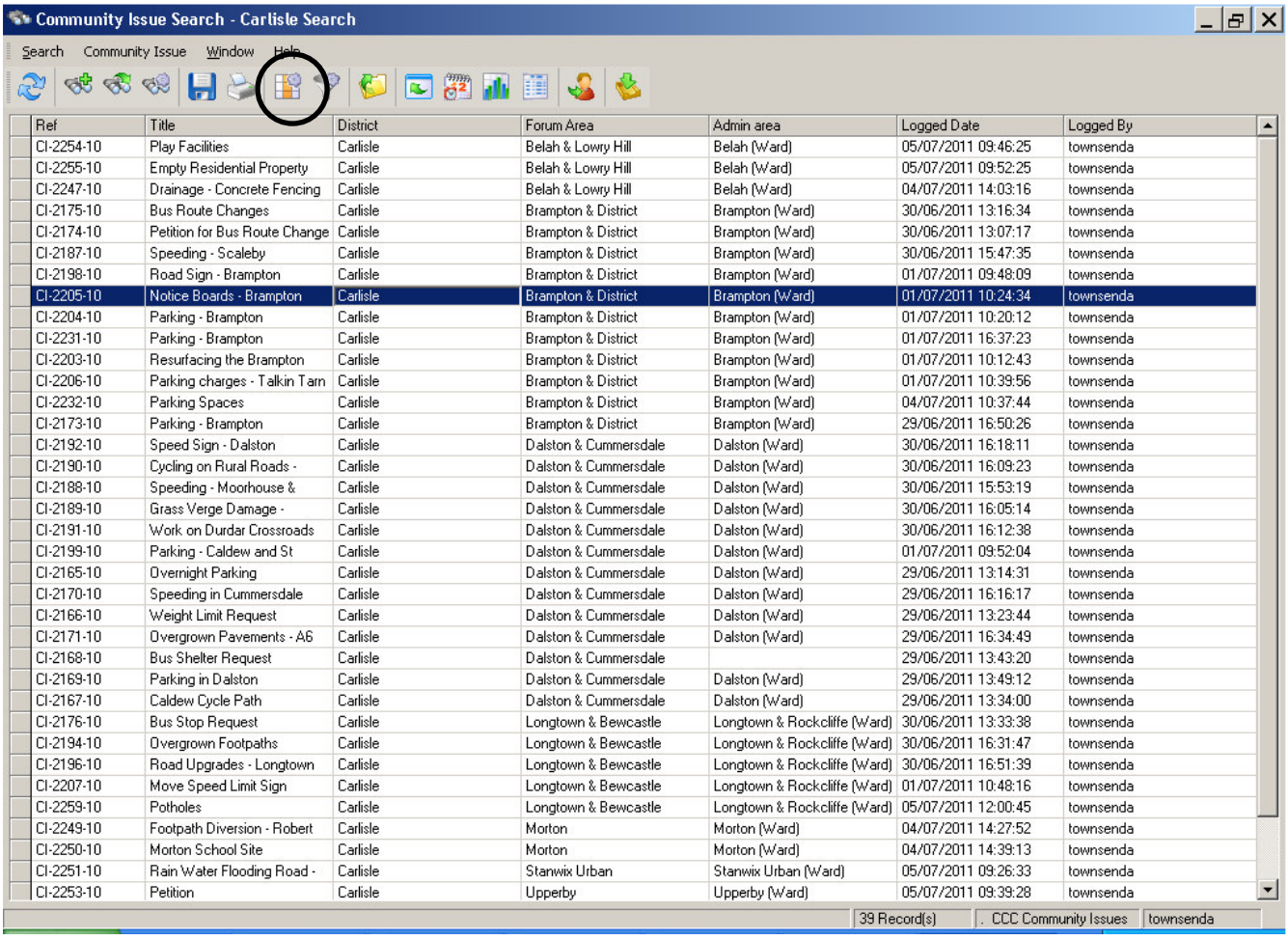


The search function is broadly similar to a query function in an Access database, where you can set your own search criteria. Here there are searches already set up by district.

To open one, select Search-Open from the menu or click the icon. The following window will appear:



Double-click one of the searches to open, it will appear as a table, thus:

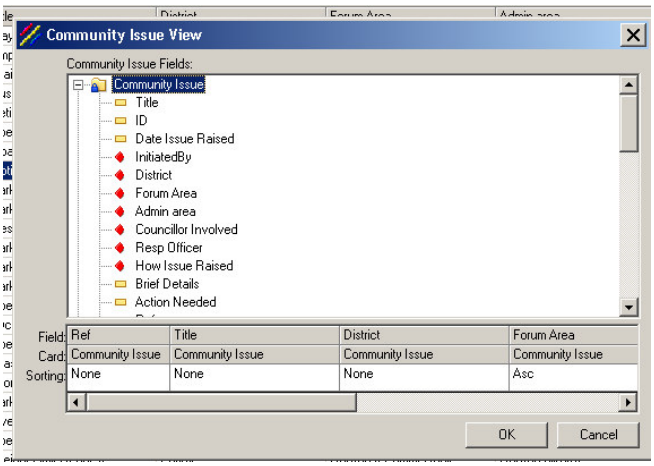


Ref	Title	District	Forum Area	Admin area	Logged Date	Logged By
CI-2254-10	Play Facilities	Carlisle	Belah & Lowry Hill	Belah (Ward)	05/07/2011 09:46:25	townsenda
CI-2255-10	Empty Residential Property	Carlisle	Belah & Lowry Hill	Belah (Ward)	05/07/2011 09:52:25	townsenda
CI-2247-10	Drainage - Concrete Fencing	Carlisle	Belah & Lowry Hill	Belah (Ward)	04/07/2011 14:03:16	townsenda
CI-2175-10	Bus Route Changes	Carlisle	Brampton & District	Brampton (Ward)	30/06/2011 13:16:34	townsenda
CI-2174-10	Petition for Bus Route Change	Carlisle	Brampton & District	Brampton (Ward)	30/06/2011 13:07:17	townsenda
CI-2187-10	Speeding - Scaleby	Carlisle	Brampton & District	Brampton (Ward)	30/06/2011 15:47:35	townsenda
CI-2198-10	Road Sign - Brampton	Carlisle	Brampton & District	Brampton (Ward)	01/07/2011 09:48:09	townsenda
CI-2205-10	Notice Boards - Brampton	Carlisle	Brampton & District	Brampton (Ward)	01/07/2011 10:24:34	townsenda
CI-2204-10	Parking - Brampton	Carlisle	Brampton & District	Brampton (Ward)	01/07/2011 10:20:12	townsenda
CI-2231-10	Parking - Brampton	Carlisle	Brampton & District	Brampton (Ward)	01/07/2011 16:37:23	townsenda
CI-2203-10	Resurfacing the Brampton	Carlisle	Brampton & District	Brampton (Ward)	01/07/2011 10:12:43	townsenda
CI-2206-10	Parking charges - Talkin Tarn	Carlisle	Brampton & District	Brampton (Ward)	01/07/2011 10:39:56	townsenda
CI-2232-10	Parking Spaces	Carlisle	Brampton & District	Brampton (Ward)	04/07/2011 10:37:44	townsenda
CI-2173-10	Parking - Brampton	Carlisle	Brampton & District	Brampton (Ward)	29/06/2011 16:50:26	townsenda
CI-2192-10	Speed Sign - Dalston	Carlisle	Dalston & Cummersdale	Dalston (Ward)	30/06/2011 16:18:11	townsenda
CI-2190-10	Cycling on Rural Roads -	Carlisle	Dalston & Cummersdale	Dalston (Ward)	30/06/2011 16:09:23	townsenda
CI-2188-10	Speeding - Moorhouse &	Carlisle	Dalston & Cummersdale	Dalston (Ward)	30/06/2011 15:53:19	townsenda
CI-2189-10	Grass Verge Damage -	Carlisle	Dalston & Cummersdale	Dalston (Ward)	30/06/2011 16:05:14	townsenda
CI-2191-10	Work on Durdar Crossroads	Carlisle	Dalston & Cummersdale	Dalston (Ward)	30/06/2011 16:12:38	townsenda
CI-2199-10	Parking - Caldew and St	Carlisle	Dalston & Cummersdale	Dalston (Ward)	01/07/2011 09:52:04	townsenda
CI-2165-10	Overnight Parking	Carlisle	Dalston & Cummersdale	Dalston (Ward)	29/06/2011 13:14:31	townsenda
CI-2170-10	Speeding in Cummersdale	Carlisle	Dalston & Cummersdale	Dalston (Ward)	29/06/2011 16:16:17	townsenda
CI-2166-10	Weight Limit Request	Carlisle	Dalston & Cummersdale	Dalston (Ward)	29/06/2011 13:23:44	townsenda
CI-2171-10	Overgrown Pavements - A6	Carlisle	Dalston & Cummersdale	Dalston (Ward)	29/06/2011 16:34:49	townsenda
CI-2168-10	Bus Shelter Request	Carlisle	Dalston & Cummersdale		29/06/2011 13:43:20	townsenda
CI-2169-10	Parking in Dalston	Carlisle	Dalston & Cummersdale	Dalston (Ward)	29/06/2011 13:49:12	townsenda
CI-2167-10	Caldew Cycle Path	Carlisle	Dalston & Cummersdale	Dalston (Ward)	29/06/2011 13:34:00	townsenda
CI-2176-10	Bus Stop Request	Carlisle	Longtown & Bewcastle	Longtown & Rockcliffe (Ward)	30/06/2011 13:33:38	townsenda
CI-2194-10	Overgrown Footpaths	Carlisle	Longtown & Bewcastle	Longtown & Rockcliffe (Ward)	30/06/2011 16:31:47	townsenda
CI-2196-10	Road Upgrades - Longtown	Carlisle	Longtown & Bewcastle	Longtown & Rockcliffe (Ward)	30/06/2011 16:51:39	townsenda
CI-2207-10	Move Speed Limit Sign	Carlisle	Longtown & Bewcastle	Longtown & Rockcliffe (Ward)	01/07/2011 10:48:16	townsenda
CI-2259-10	Potholes	Carlisle	Longtown & Bewcastle	Longtown & Rockcliffe (Ward)	05/07/2011 12:00:45	townsenda
CI-2249-10	Footpath Diversion - Robert	Carlisle	Morton	Morton (Ward)	04/07/2011 14:27:52	townsenda
CI-2250-10	Morton School Site	Carlisle	Morton	Morton (Ward)	04/07/2011 14:39:13	townsenda
CI-2251-10	Rain Water Flooding Road -	Carlisle	Stanwix Urban	Stanwix Urban (Ward)	05/07/2011 09:26:33	townsenda
CI-2253-10	Petition	Carlisle	Upperby	Upperby (Ward)	05/07/2011 09:39:28	townsenda

If you double-click on any line, that issue will be opened enabling it to be updated.

Inputting and amending data is the same as for creating a new issue; see pages 3 to 9 if you are unsure. Also remember to **SAVE** any changes.

The Setup View icon (circled above) enables you to make changes to the fields displayed and search parameters. If you opt to set up your own queries, the following will appear:



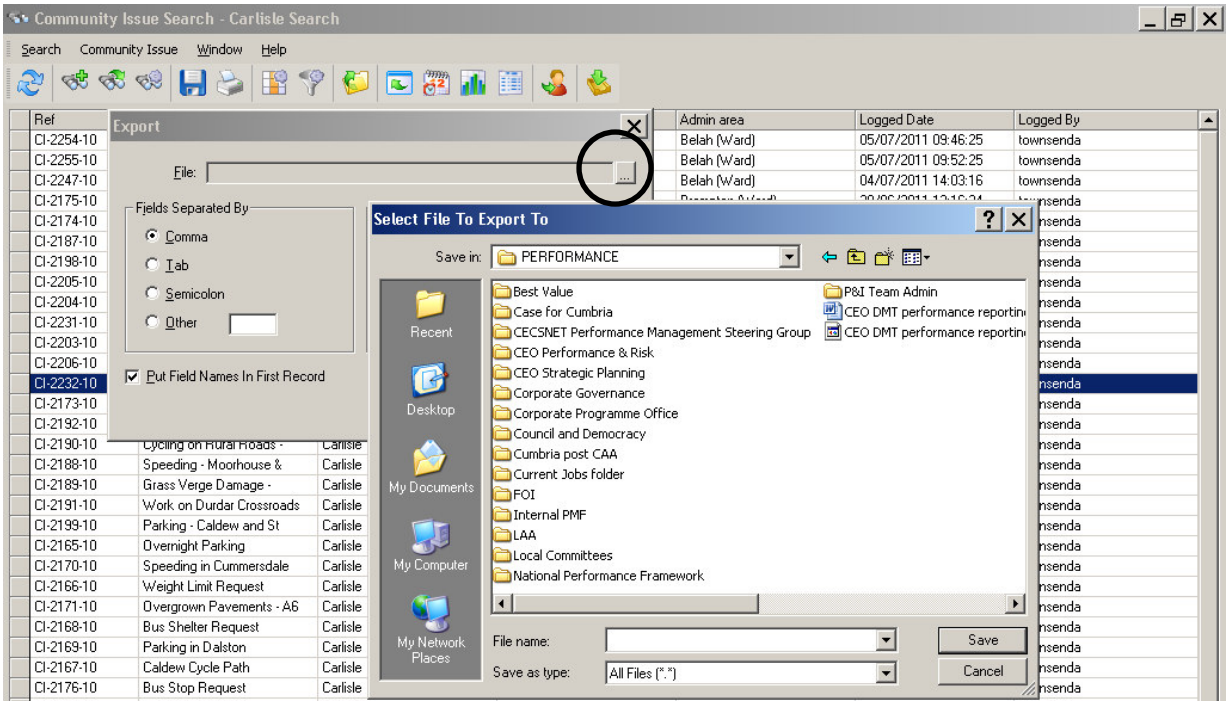
Field names can be dragged and dropped in to the table view. Drag a field away from the table if you do not need it. This also allows sorting an ascending or descending order, on any field.

When complete, click OK and you will see the results. In order to preserve the original query, from the menu select Search-Save As. Save it with an appropriate name.

The output can be printed or saved as a separate document. To print, click on the print icon.

Any saved document will be in csv format for use in an Excel spreadsheet. Select Search-Export and an 'Export' window will appear. Ensure fields are separated by comma, there is no text delimiter and tick the box alongside 'Put Field Names in first Record'. Click the box (circled below) alongside 'File' and you can select where the file is to be saved: the folder mentioned on page 7 would be ideal.

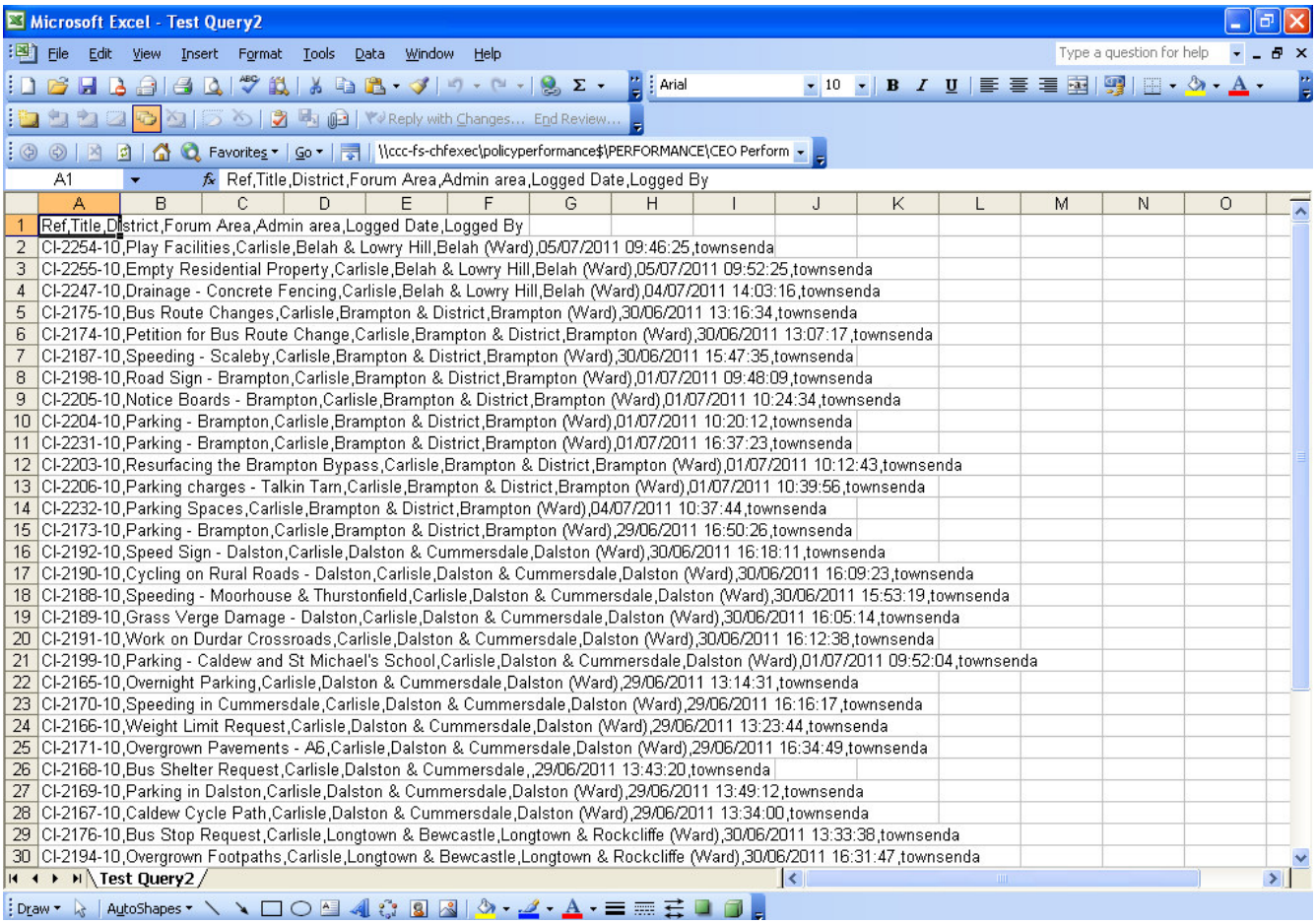
You should by now see this:



Type a suitable file name where indicated, ensuring it ends '.xls'. You can then open it in Excel where it needs to be formatted as a table. This is explained in the next paragraph.

Arranging Text into Columns in Excel

When you open the query file you have just saved into Excel, it will look like this:


Microsoft Excel - Test Query2
File Edit View Insert Format Tools Data Window Help
Type a question for help
Arial 10
Reply with Changes... End Review...
Favorites Go \\ccc-fs-chfexec\policyperformance$\PERFORMANCE\CEO Perform
A1
Ref,Title,District,Forum Area,Admin area,Logged Date,Logged By
1 Ref,Title,District,Forum Area,Admin area,Logged Date,Logged By
2 CI-2254-10,Play Facilities,Carlisle,Belah & Lowry Hill,Belah (Ward),05/07/2011 09:46:25,townsenda
3 CI-2255-10,Empty Residential Property,Carlisle,Belah & Lowry Hill,Belah (Ward),05/07/2011 09:52:25,townsenda
4 CI-2247-10,Drainage - Concrete Fencing,Carlisle,Belah & Lowry Hill,Belah (Ward),04/07/2011 14:03:16,townsenda
5 CI-2175-10,Bus Route Changes,Carlisle,Brampton & District,Brampton (Ward),30/06/2011 13:16:34,townsenda
6 CI-2174-10,Petition for Bus Route Change,Carlisle,Brampton & District,Brampton (Ward),30/06/2011 13:07:17,townsenda
7 CI-2187-10,Speeding - Scaleby,Carlisle,Brampton & District,Brampton (Ward),30/06/2011 15:47:35,townsenda
8 CI-2198-10,Road Sign - Brampton,Carlisle,Brampton & District,Brampton (Ward),01/07/2011 09:48:09,townsenda
9 CI-2205-10,Notice Boards - Brampton,Carlisle,Brampton & District,Brampton (Ward),01/07/2011 10:24:34,townsenda
10 CI-2204-10,Parking - Brampton,Carlisle,Brampton & District,Brampton (Ward),01/07/2011 10:20:12,townsenda
11 CI-2231-10,Parking - Brampton,Carlisle,Brampton & District,Brampton (Ward),01/07/2011 16:37:23,townsenda
12 CI-2203-10,Resurfacing the Brampton Bypass,Carlisle,Brampton & District,Brampton (Ward),01/07/2011 10:12:43,townsenda
13 CI-2206-10,Parking charges - Talkin Tarn,Carlisle,Brampton & District,Brampton (Ward),01/07/2011 10:39:56,townsenda
14 CI-2232-10,Parking Spaces,Carlisle,Brampton & District,Brampton (Ward),04/07/2011 10:37:44,townsenda
15 CI-2173-10,Parking - Brampton,Carlisle,Brampton & District,Brampton (Ward),29/06/2011 16:50:26,townsenda
16 CI-2192-10,Speed Sign - Dalston,Carlisle,Dalston & Cummersdale,Dalston (Ward),30/06/2011 16:18:11,townsenda
17 CI-2190-10,Cycling on Rural Roads - Dalston,Carlisle,Dalston & Cummersdale,Dalston (Ward),30/06/2011 16:09:23,townsenda
18 CI-2188-10,Speeding - Moorhouse & Thurstonfield,Carlisle,Dalston & Cummersdale,Dalston (Ward),30/06/2011 15:53:19,townsenda
19 CI-2189-10,Grass Verge Damage - Dalston,Carlisle,Dalston & Cummersdale,Dalston (Ward),30/06/2011 16:05:14,townsenda
20 CI-2191-10,Work on Durdar Crossroads,Carlisle,Dalston & Cummersdale,Dalston (Ward),30/06/2011 16:12:38,townsenda
21 CI-2199-10,Parking - Caldew and St Michael's School,Carlisle,Dalston & Cummersdale,Dalston (Ward),01/07/2011 09:52:04,townsenda
22 CI-2165-10,Overnight Parking,Carlisle,Dalston & Cummersdale,Dalston (Ward),29/06/2011 13:14:31,townsenda
23 CI-2170-10,Speeding in Cummersdale,Carlisle,Dalston & Cummersdale,Dalston (Ward),29/06/2011 16:16:17,townsenda
24 CI-2166-10,Weight Limit Request,Carlisle,Dalston & Cummersdale,Dalston (Ward),29/06/2011 13:23:44,townsenda
25 CI-2171-10,Overgrown Pavements - A6,Carlisle,Dalston & Cummersdale,Dalston (Ward),29/06/2011 16:34:49,townsenda
26 CI-2168-10,Bus Shelter Request,Carlisle,Dalston & Cummersdale,,29/06/2011 13:43:20,townsenda
27 CI-2169-10,Parking in Dalston,Carlisle,Dalston & Cummersdale,Dalston (Ward),29/06/2011 13:49:12,townsenda
28 CI-2167-10,Caldew Cycle Path,Carlisle,Dalston & Cummersdale,Dalston (Ward),29/06/2011 13:34:00,townsenda
29 CI-2176-10,Bus Stop Request,Carlisle,Longtown & Bewcastle,Longtown & Rockcliffe (Ward),30/06/2011 13:33:38,townsenda
30 CI-2194-10,Overgrown Footpaths,Carlisle,Longtown & Bewcastle,Longtown & Rockcliffe (Ward),30/06/2011 16:31:47,townsenda
Test Query2
Draw AutoShapes

Select all column A, then from the menu toolbar select Data-Text to Columns. A wizard will appear. There are three steps, in which you need to do the following:

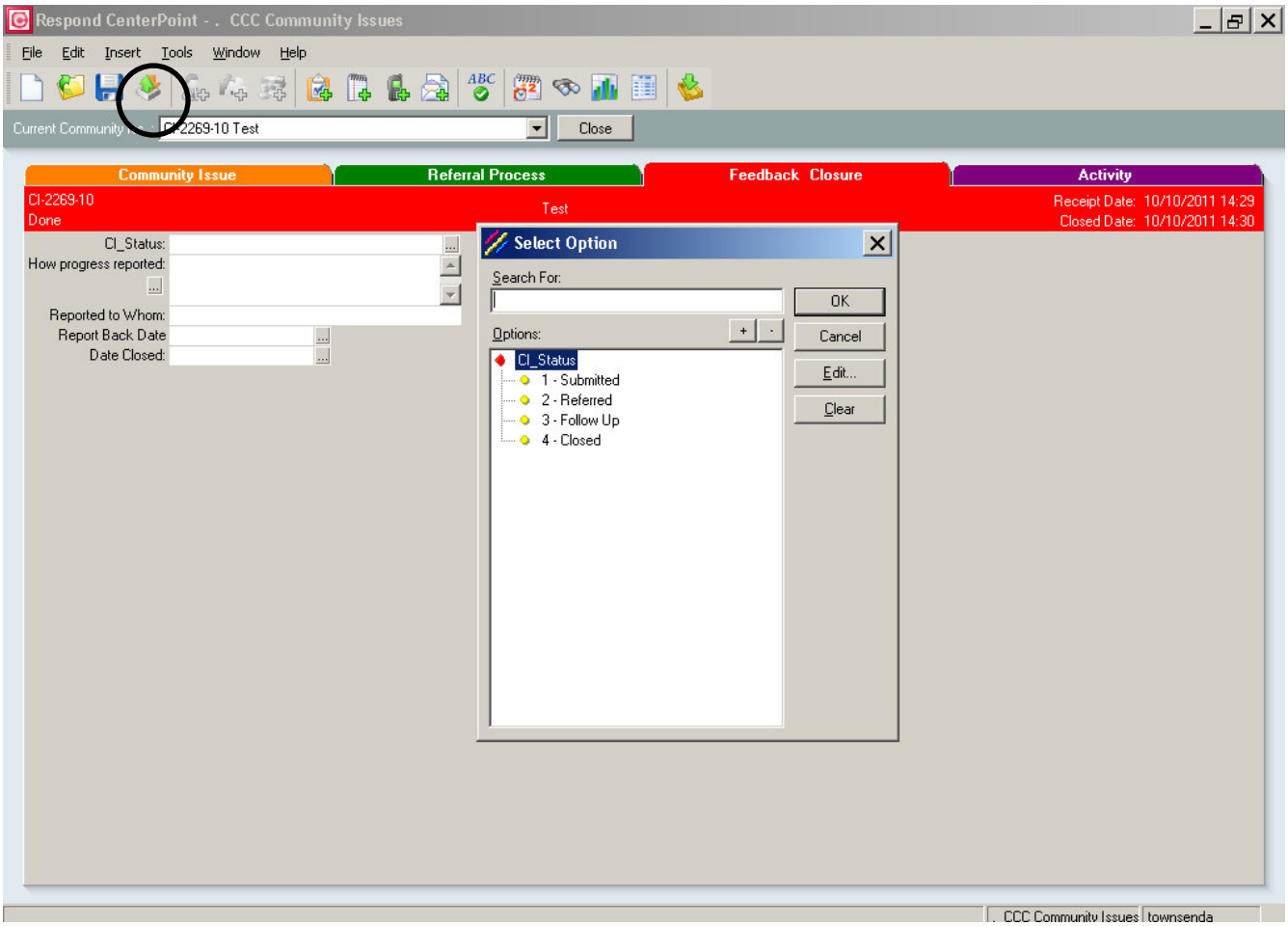
- Step 1 – Ensure the data is 'Delimited'.
- Step 2 – The delimiter is a comma.
- Step 3 – Check the format for each column. Most would be general, but ensure dates are formatted 'DMY'. Click 'Finish'.

All data should now be in its correct columns. Re-save the spreadsheet as Microsoft Excel Workbook format.

When searching is complete, select Search-Close.

Closing an Issue

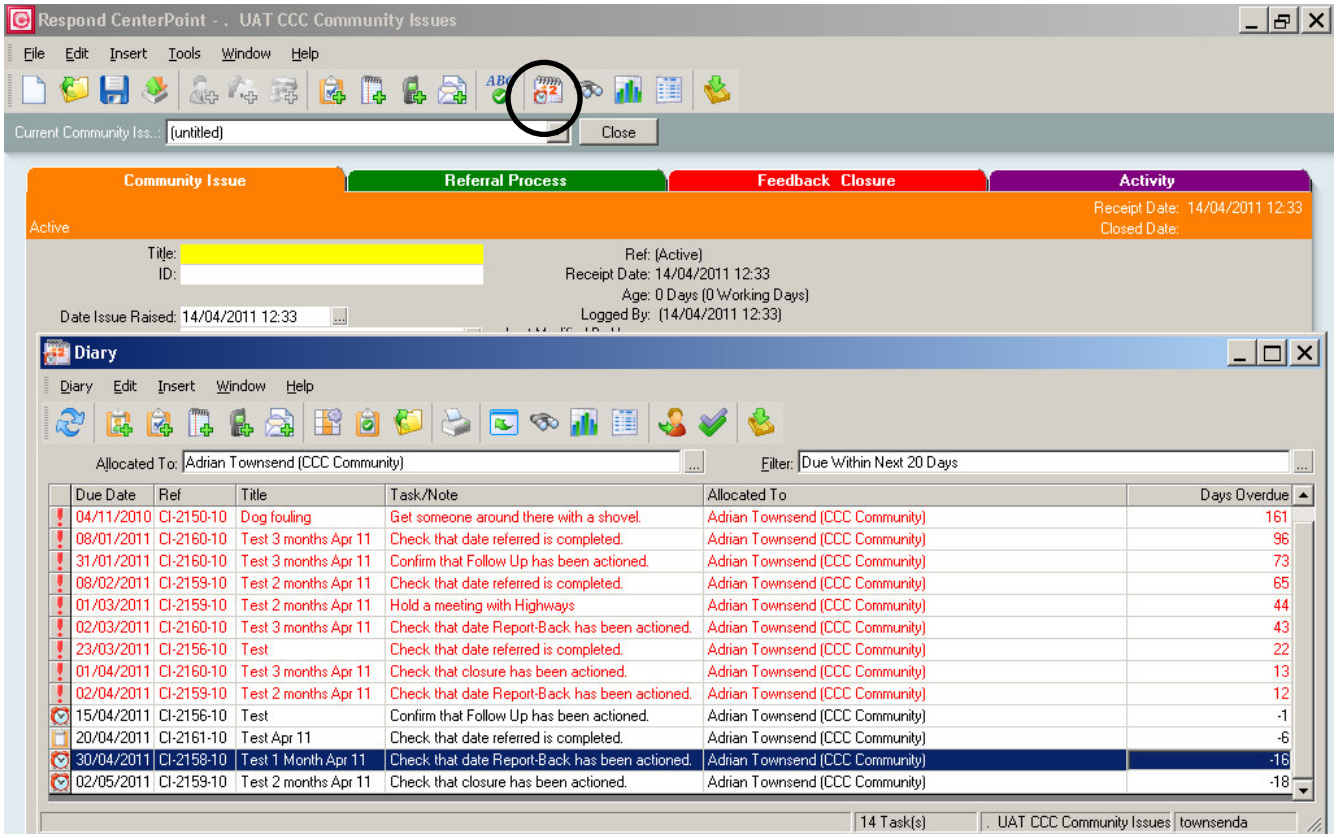
First, set the RAG Rating in the Referral Process section to Green, then ensure all associated tasks/reminders etc are closed. This can be checked by looking in the Activity section. Next, go to the Feedback Closure section:



In the field 'CI_Status', select option 4, then enter the date closed.

Finally, click the icon circled above. This tells the system that the status of the issue is to be changed, i.e. closed. A message will appear asking you to confirm – click 'Yes'. If necessary, the icon can be clicked again to change the issue back to Active.

Diary


Respond CenterPoint - . UAT CCC Community Issues
File Edit Insert Tools Window Help
Current Community Iss..: (untitled)
Close
Community Issue
Referral Process
Feedback Closure
Activity
Active
Receipt Date: 14/04/2011 12:33
Closed Date:
Title:
ID:
Ref: (Active)
Receipt Date: 14/04/2011 12:33
Age: 0 Days (0 Working Days)
Logged By: (14/04/2011 12:33)
Date Issue Raised: 14/04/2011 12:33
Diary
Diary Edit Insert Window Help
Allocated To: Adrian Townsend (CCC Community)
Filter: Due Within Next 20 Days
Due Date | Ref | Title | Task/Note | Allocated To | Days Overdue
04/11/2010 | CI-2150-10 | Dog fouling | Get someone around there with a shovel. | Adrian Townsend (CCC Community) | 161
08/01/2011 | CI-2160-10 | Test 3 months Apr 11 | Check that date referred is completed. | Adrian Townsend (CCC Community) | 96
31/01/2011 | CI-2160-10 | Test 3 months Apr 11 | Confirm that Follow Up has been actioned. | Adrian Townsend (CCC Community) | 73
08/02/2011 | CI-2159-10 | Test 2 months Apr 11 | Check that date referred is completed. | Adrian Townsend (CCC Community) | 65
01/03/2011 | CI-2159-10 | Test 2 months Apr 11 | Hold a meeting with Highways | Adrian Townsend (CCC Community) | 44
02/03/2011 | CI-2160-10 | Test 3 months Apr 11 | Check that date Report-Back has been actioned. | Adrian Townsend (CCC Community) | 43
23/03/2011 | CI-2156-10 | Test | Check that date referred is completed. | Adrian Townsend (CCC Community) | 22
01/04/2011 | CI-2160-10 | Test 3 months Apr 11 | Check that closure has been actioned. | Adrian Townsend (CCC Community) | 13
02/04/2011 | CI-2159-10 | Test 2 months Apr 11 | Check that date Report-Back has been actioned. | Adrian Townsend (CCC Community) | 12
15/04/2011 | CI-2156-10 | Test | Confirm that Follow Up has been actioned. | Adrian Townsend (CCC Community) | -1
20/04/2011 | CI-2161-10 | Test Apr 11 | Check that date referred is completed. | Adrian Townsend (CCC Community) | -6
30/04/2011 | CI-2158-10 | Test 1 Month Apr 11 | Check that date Report-Back has been actioned. | Adrian Townsend (CCC Community) | -16
02/05/2011 | CI-2159-10 | Test 2 months Apr 11 | Check that closure has been actioned. | Adrian Townsend (CCC Community) | -18
14 Task(s)
. UAT CCC Community Issues
townsenda

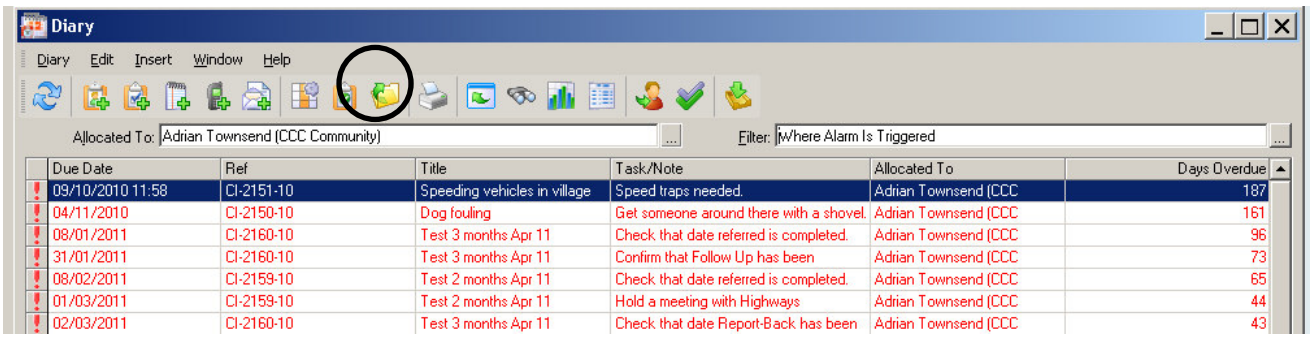
You can access your diary either as part of the logging on process or by clicking the icon circled above. The diary contains all triggers and tasks associated with community issues which are allocated to you.

All tasks in red type are overdue and must be actioned immediately; those in black type are outstanding but within deadlines.

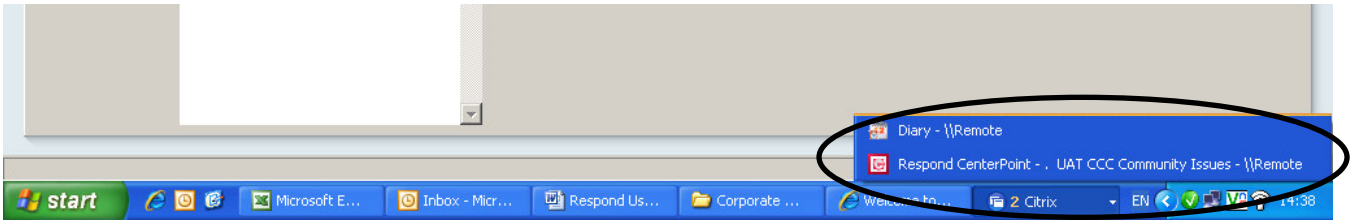
It is possible to filter the list to concentrate on only overdue tasks, or those which become due in a specified period. Click the button alongside the 'Filter' field and select your criteria.

To open a task, double click on it. This will allow you to make any changes.

You may find it easier to open the issue to which the task is associated. To do this, ensure the correct task is highlighted and click on the 'Open Community Issue' icon, see below:


Diary
Diary Edit Insert Window Help
Allocated To: Adrian Townsend (CCC Community)
Filter: Where Alarm Is Triggered
Due Date | Ref | Title | Task/Note | Allocated To | Days Overdue
09/10/2010 11:58 | CI-2151-10 | Speeding vehicles in village | Speed traps needed. | Adrian Townsend (CCC | 187
04/11/2010 | CI-2150-10 | Dog fouling | Get someone around there with a shovel. | Adrian Townsend (CCC | 161
08/01/2011 | CI-2160-10 | Test 3 months Apr 11 | Check that date referred is completed. | Adrian Townsend (CCC | 96
31/01/2011 | CI-2160-10 | Test 3 months Apr 11 | Confirm that Follow Up has been | Adrian Townsend (CCC | 73
08/02/2011 | CI-2159-10 | Test 2 months Apr 11 | Check that date referred is completed. | Adrian Townsend (CCC | 65
01/03/2011 | CI-2159-10 | Test 2 months Apr 11 | Hold a meeting with Highways | Adrian Townsend (CCC | 44
02/03/2011 | CI-2160-10 | Test 3 months Apr 11 | Check that date Report-Back has been | Adrian Townsend (CCC | 43

This opens the issue, and you can either update the task in the 'Activity' sheet or return to the diary via selecting from the open windows icons at the bottom of the screen (see below, circled):

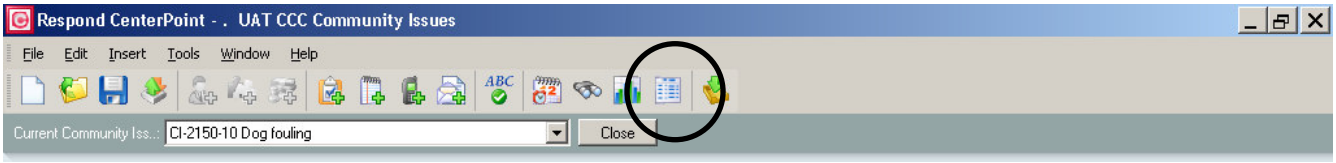


Instructions for closing tasks are provided on page 8.

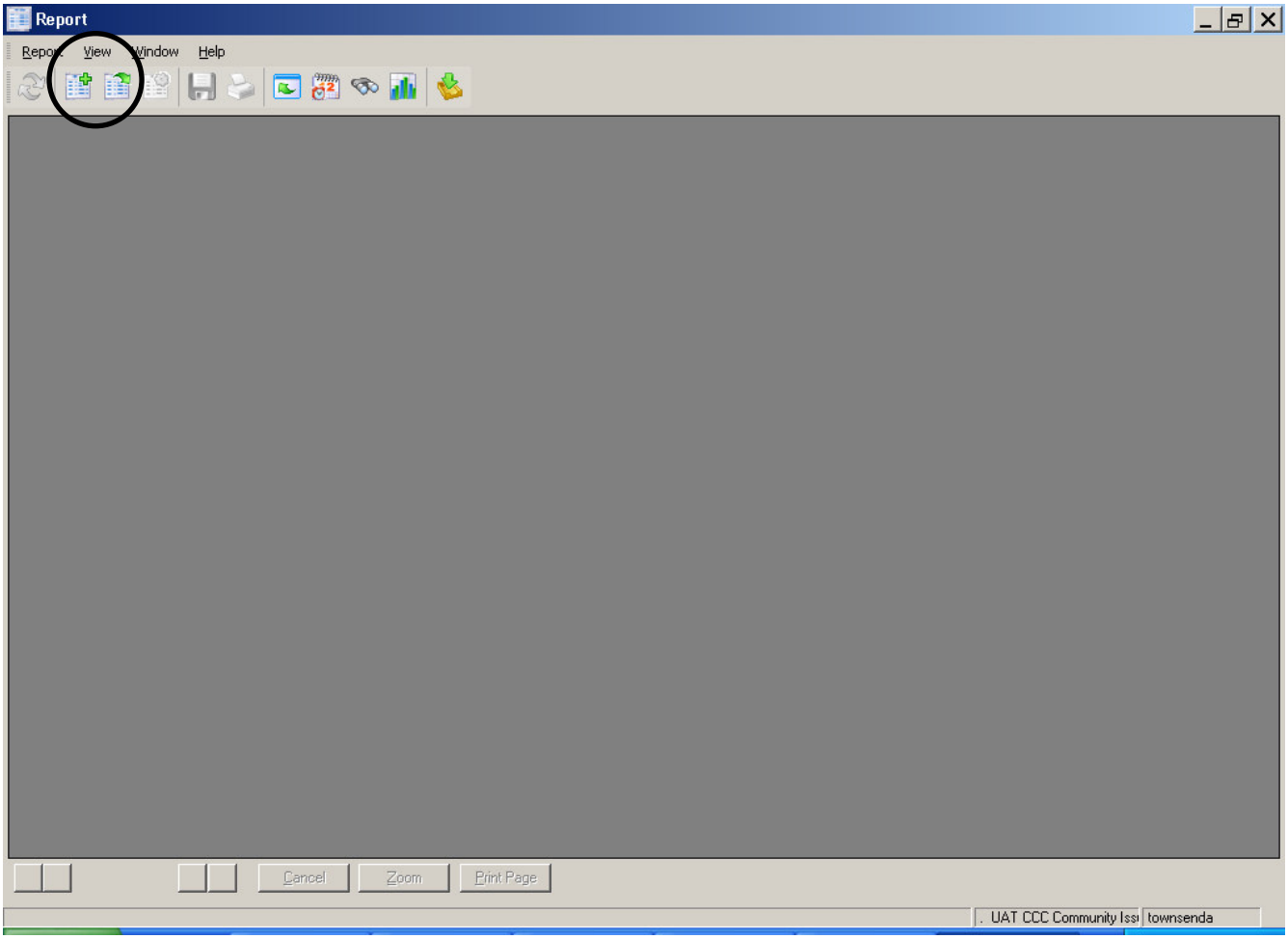
To exit the diary, click Diary-Exit or the X at the top right-hand corner of the diary screen.

Reports

There are standard reports on the system, or you can build your own. Assistance can be provided – contact Adrian Townsend (adrian.townsend@cumbria.gov.uk).


Respond CenterPoint - . UAT CCC Community Issues
File Edit Insert Tools Window Help
Current Community Iss... CI-2150-10 Dog fouling
Close

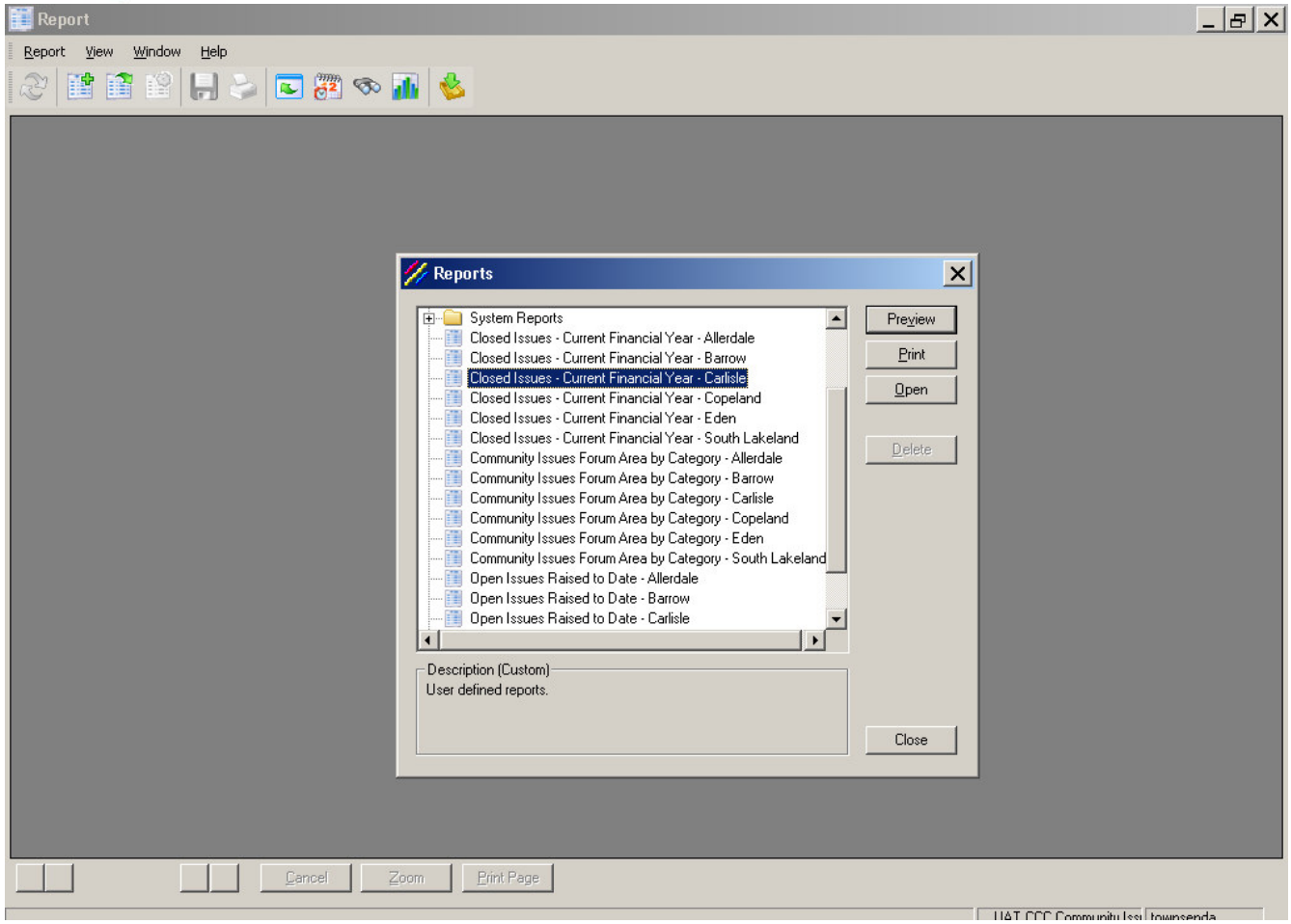
Click on the Report window (circled above) and the following screen will appear:



There are two icons circled above: click the one on the left to create a new report and the one on the right to open an existing one.

Open Existing Reports

Of the two icons circled in the screen layout above, click the right-hand one to open a report that has already been set up. The following will appear:


Report
Report View Window Help
Reports
System Reports
Closed Issues - Current Financial Year - Allerdale
Closed Issues - Current Financial Year - Barrow
Closed Issues - Current Financial Year - Carlisle
Closed Issues - Current Financial Year - Copeland
Closed Issues - Current Financial Year - Eden
Closed Issues - Current Financial Year - South Lakeland
Community Issues Forum Area by Category - Allerdale
Community Issues Forum Area by Category - Barrow
Community Issues Forum Area by Category - Carlisle
Community Issues Forum Area by Category - Copeland
Community Issues Forum Area by Category - Eden
Community Issues Forum Area by Category - South Lakeland
Open Issues Raised to Date - Allerdale
Open Issues Raised to Date - Barrow
Open Issues Raised to Date - Carlisle
Description (Custom)
User defined reports.
Preview
Print
Open
Delete
Close
Cancel
Zoom
Print Page

Below the set of folders, you will see various reports for each area. There are three types of report available:

- **Open Issues Raised to Date**
  - A list of all issues recorded in that area which are still open.
  - Includes age of issue in days and RAG rating.
  - This is a useful report to view on a regular basis to monitor longstanding issues and identify any duplicates.

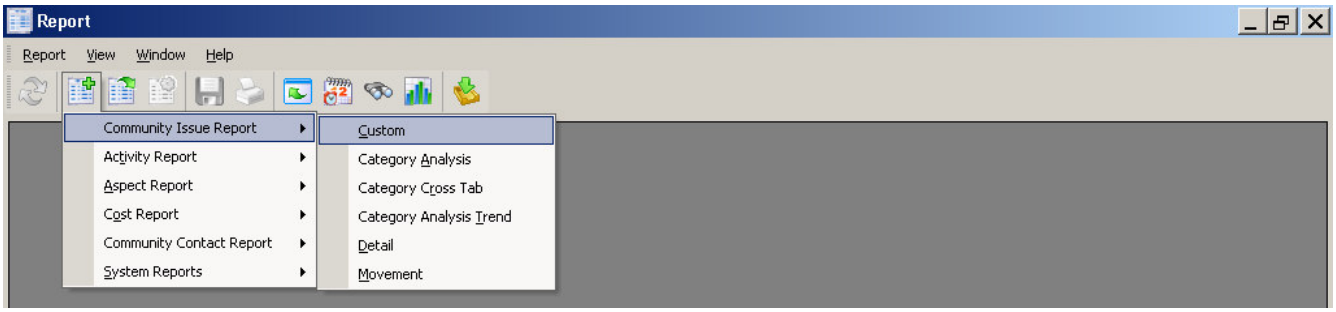
- **Community Issues Forum Area by Category**
  - A tabular report showing numbers of issues raised since the start of the current financial year in each forum area, broken down by category.
  - Row and column totals are also provided.

- **Closed Issues – Current Financial year**
  - A list of all issues in that area which were closed in the current financial year.
  - Includes how each issue was fed back and to whom.
  - RAG rating is shown for validation: all should be green in this report.

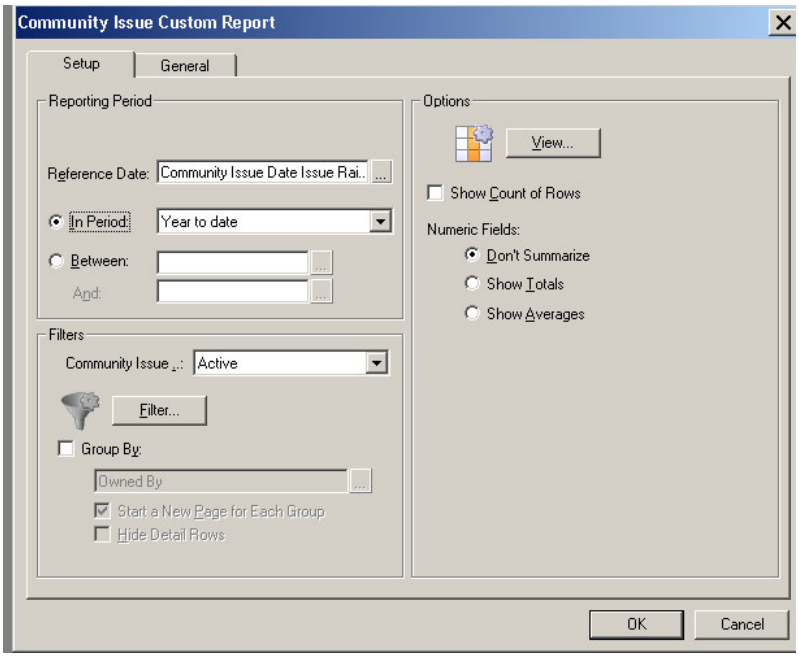
These reports are useful for regular monitoring by users, and management information. They may be customised according to your requirements; it is a simple matter to add or remove fields, or to change the date range. These are covered in the next section on creating new reports.

Create New Report

Click on the appropriate icon, select 'Community Issue Report' then any of the categories listed; see the screen view below:

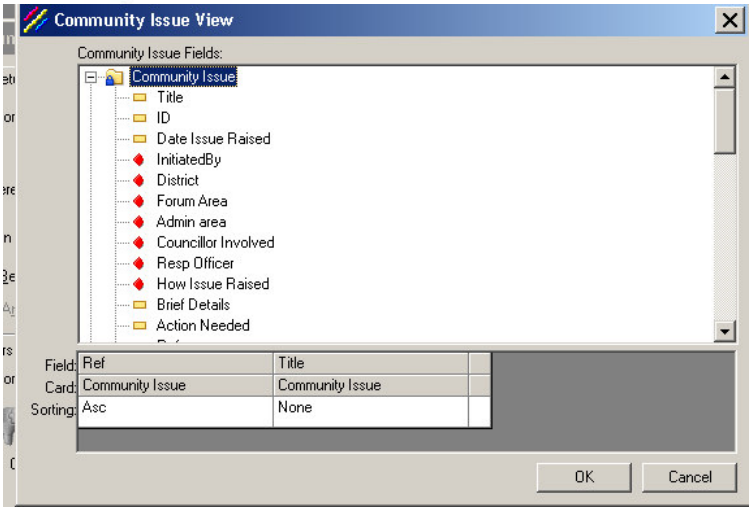


You are now faced with a set of options on how to structure your report, see below:



The main areas to complete are:

- **Reference Date**: the date from which any calculations are taken. Mostly this would be the date issues were raised.
- **In Period/Between**: select the time frame, e.g. previous quarter, between two dates.
- **Filter**: click on this button and you can select filters on any field, e.g. restrict the data to cover one district only.
- **View**: click on this button to add columns to your report. A full list of all fields will appear as shown below:



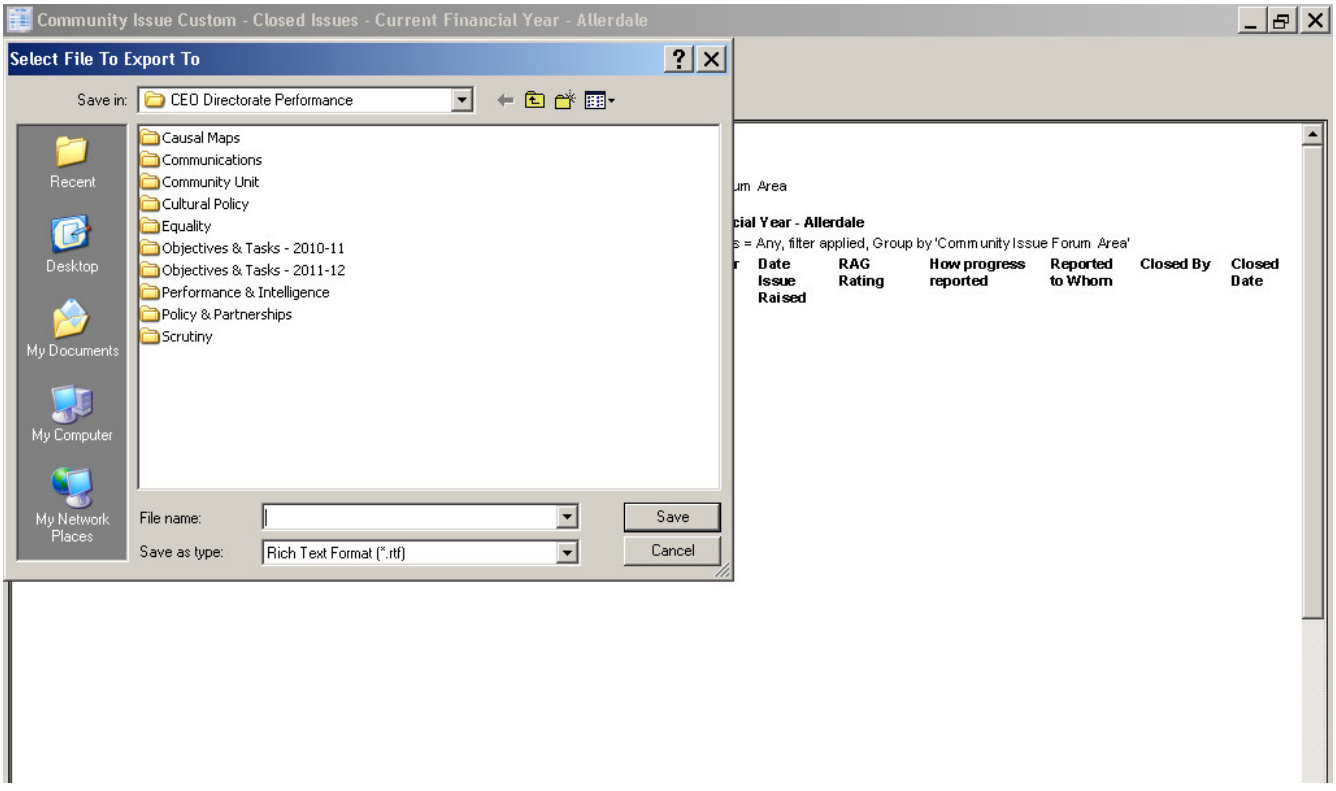
Simply drag and drop each field to where you would like it to appear on the report. Note you can sort the data in any field.

- You may also show a count of records, or perform simple calculations with your data.
- The 'General' tab contains a facility to add titles and change the font.

Saving Reports

To save a report you have just designed or amended, click on the disk icon or if you wish to save it to a different name, from the toolbar select Report-Save As.

To save it in a different format to allow reporting or editing, Respond allows reports to be saved as pdf, rich text format or html. From the toolbar, select Report-Export. You will then see the following:



Select the file area in which to export the report; you may wish to use the same folder that you were recommended to set up earlier, see page 6.

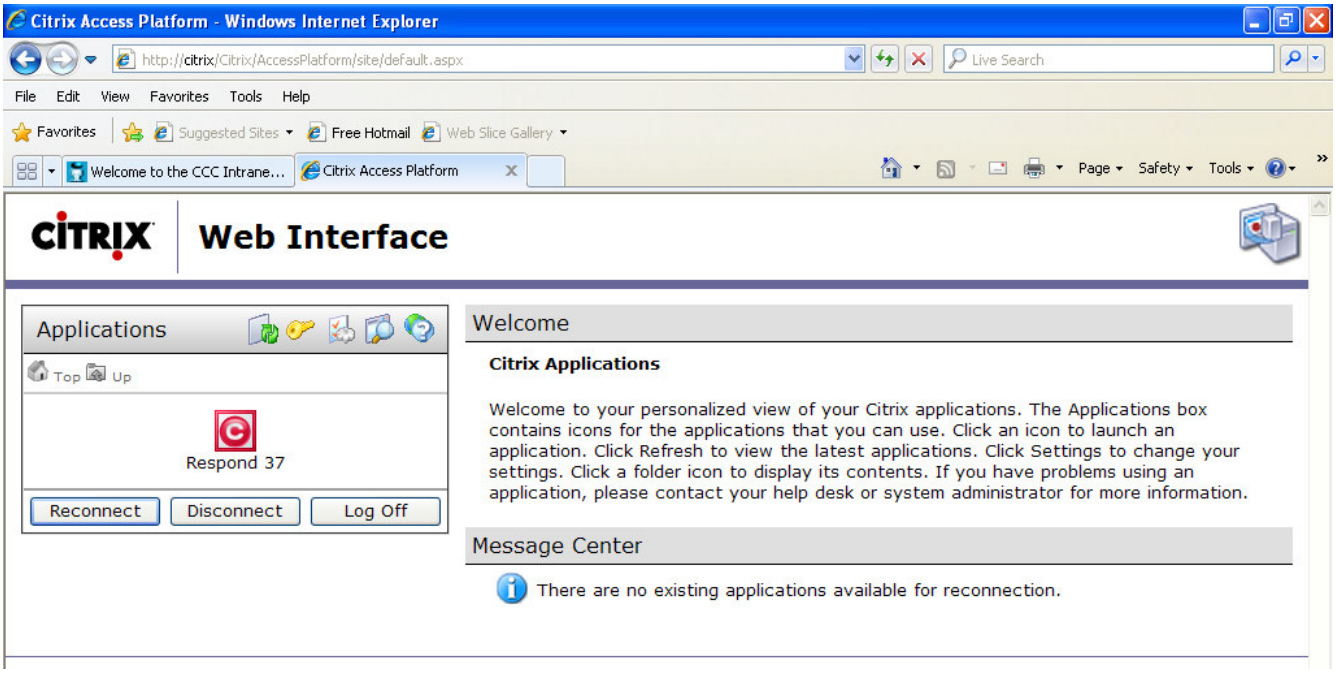
- The pdf format is best if you wish to save the report as it is and not make any changes to the layout.
- If you wish to edit the exported version, save as rtf which can be opened in Word, or csv which can be opened in Excel.
- There is an option to save as html, but this is unlikely to be of any use unless it is to be published on a website.

When you have finished working on reports and wish to return to the main Respond system, click the X in the top right-hand corner of the screen.

Exiting/Logging Off

Ensure any new/amended records and reports are saved. In most instances you will be given reminders, but it is advisable to get into the habit of saving as you go along.

- Select File/Exit or click the X in the top right-hand corner of the screen.
- You will then be returned to the Citrix web interface screen, as shown below:


Citrix Access Platform - Windows Internet Explorer
http://citrix/Citrix/AccessPlatform/site/default.aspx
File Edit View Favorites Tools Help
Favorites
Suggested Sites
Free Hotmail
Web Slice Gallery
Welcome to the CCC Intrane...
Citrix Access Platform
Page
Safety
Tools
CITRIX
Web Interface
Applications
Top
Up
Respond 37
Reconnect
Disconnect
Log Off
Welcome
Citrix Applications
Welcome to your personalized view of your Citrix applications. The Applications box contains icons for the applications that you can use. Click an icon to launch an application. Click Refresh to view the latest applications. Click Settings to change your settings. Click a folder icon to display its contents. If you have problems using an application, please contact your help desk or system administrator for more information.
Message Center
There are no existing applications available for reconnection.

- Click 'Log Off'
- You will see a message confirming that you have logged off. A link is provided allowing you to log back in at a later stage.
- NB: If you are not using the system you must exit Respond, as not doing so may prevent other users accessing the system.